CREATIVE PLANNING

Title: Director, Strategic Alliance

Location: Kansas City or Remote

Job Description: **JOB SUMMARY**

Creative Planning is a nationally recognized independent wealth advisory firm that provides investment management services and full comprehensive financial planning in-house. Creative Planning addresses all aspects of financial planning from estate planning, tax strategy and risk management to retirement, education and charitable planning.

The **Director, Strategic Alliance** is responsible for driving organic growth through the development of referral partnerships. The Director, Strategic Alliance will create and implement business development strategies, coordinate outreach efforts, and effectively communicate the firm's value proposition.

The job duties include identifying and cultivating relationships with key CPA influencers to generate referrals and expand the client base. This role requires a strong background in relationship management, excellent communication and negotiation skills, and a track record of success in fostering high-value partnerships.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES:

- Identify and pursue potential CPA partners that align with the organization's strategic objectives.
- Clearly communicate the range of services Creative Planning offers CPA clients.
- Build and maintain strong relationships with key stakeholders in partner organizations.
- Lead negotiations for partnership agreements, ensuring favorable terms and alignment with the organization's long-term goals.
- Monitor the performance and progress of partnerships
- Ensure compliance with regulatory requirements and company policies in all partnership activities.

REQUIRED EXPERIENCE/QUALIFICATIONS:

- Bachelor’s degree, preferably in Business, Finance, or Accounting.
- Strong understanding of complex financial topics and the ability to present them effectively to clients.
- High attention to detail and the capability to perform precise, accurate work.
- 5+ years of experience in relationship management or new client acquisition, with a proven record of success.
- Excellent communication skills, with the ability to convey information clearly and build strong relationships with both potential and existing clients.

- Proven negotiation skills and a history of successfully closing deals.
- Ability to streamline and improve existing processes and create new ones to enhance operational efficiency.
- 5 or more years of financial services or CPA experience.

TECHNICAL SKILLS:

- Proficiency in MS Word, Excel and PowerPoint
- Ability to adapt and integrate new technology quickly
- Comfortable with Microsoft Teams and Zoom